Position Title:	Operations Associate
Location:	Victor, NY
Position:	In Office
Employment Type:	Full Time
Hours:	Monday-Friday; 8am-5pm

www.maxmydash.com

Overview:
As an Operations Associate at Max Your Dash, you will be a key contributor to delivering a high-touch client experience and ensuring operational excellence across our advisory practice. This role is ideal for someone who thrives on precision, proactive service, and collaborative problem-solving in a fast-paced, client-centric environment.

You will be the go-to for a team of Financial Advisors to onboard new clients, manage investment account operations, and maintain accurate records in our CRM system. Your responsibilities will include executing money movements, coordinating financial planning data, and liaising with vendors and product sponsors to support client needs. Success in this role requires strong attention to detail, excellent communication skills, and a genuine commitment to client service.

About Us:
At Dash, we help people live fully and joyfully by aligning their financial choices with what truly matters. Our mission is to help clients *Max Their Dash* - to live with clarity, confidence, and purpose. We specialize in retirement planning and offer personalized, hands-on service that simplifies the complex and brings peace of mind. Through our Max Your Dash Blueprint, we craft flexible financial plans rooted in clients' values and proactively adapt as life evolves. We don't just manage money; we help clients build a life they love.

Job Responsibilities:

- Provide exceptional client service by promptly responding to client inquiries, resolving account-related issues, and addressing client requests for information or assistance.
- Onboard new clients after obtaining detailed, accurate account and transfer paperwork information.
- Open new investment accounts and gather required paperwork timely.
- Manage the Redtail workflows and complete tasks as assigned
- Execute money movement and asset transfers as directed including client deposits, rollovers, withdrawals, and internal transfers while adhering to regulatory requirements and internal policies, utilizing security trading platforms such as Pershing/NetX360
- Assist with client service items like beneficiary distributions, settling estates, transferring funds.
- Coordinate annually with clients to gather financial documents and update information in financial planning software such as eMoney.
- Follow up with vendors, product sponsors, and partners for documentation or inquiries on behalf of clients and/or Financial Advisors.
- Maintain client information and document client interactions, task progress, and account updates in CRM Redtail.
- Help plan and execute client events and workshops
- Other duties as assigned.

Minimum Qualifications:

- Minimum 3 years' experience in operations, business administration, or client services.
- Preferred or willingness to pursue: FINRA SIE and Series 7
- Preferred familiarity with CRM systems (Redtail) and financial platforms such as eMoney, Pershing/NetX360, or Jump AI.
- Professional demeanor and strong interpersonal skills to effectively engage with clients and team members.
- Proficiency in Microsoft Office Suite (Word, Excel, PowerPoint, Outlook) and other office tools.
- Exceptional organizational skills with a keen attention to detail.
- Excellent follow-up skills with a proactive approach to tasks and responsibilities.
- Demonstrates initiative, identifying areas for improvement and taking steps to address them effectively.
- Strong written and verbal communication skills.
- Ability to prioritize and manage multiple tasks in a fast-paced environment.
- Must have a high willingness to learn new concepts, processes, and software and be a team player.

Additional Details:

- Benefit Eligible: 401k retirement with employer contribution, Paid vacation, sick, and holiday hours.
- Opportunities for professional growth and development; including continuing education.
- Employment background and fingerprinting checks required due to regulatory compliance.
- A supportive and inclusive work environment where your contributions are valued.